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Guest Speaking Guide Helps Advisors Tap Fresh Prospecting Circles

Overlooked Arena Ripe for Disciplined, Patient Advisors

Guest Speaker is, a new step-by-step guide to help advisors prospect local clubs and organizations for minimal cost, and without the concerns of Do-Not-Call regulations. Guest speaking can be a strong additive to an advisors prospecting mix. And it's a great way to break away from the day-to-day office grind, have a little fun and meet some fresh faces.

Guest Speaker is for rookies and veterans alike whether they're building their client base, replacing lost accounts as a result of going independent or switching firms, or counteracting any erosion of their client base.

Guest Speaker shows advisors how to craft a compelling talk that exhibits their value as a credible advisor, and separate themselves from boring financial experts and "sales presenters" who turn people off. The guide also describes how to build a rich database of clubs and organizations for a steady flow of speaking dates, get referrals for more speaking engagements, create an "emergency speaker" campaign for clubs that get speaker cancellations, and acquire prospects without abusing a club's meeting agenda or protocol.

Published in report form, *Guest Speaker* is priced at \$24.00 on a 60-day no-risk trial basis. It includes sample prospecting letters, promotional pieces and phone scripts for lining up speaking dates. Details of the guide's content can be found at www.advisorloop.com

The author, George Miller, is a former broker and advisor, a writer/producer of advisor marketing tools for a major wirehouse, seasoned speaker and seminar leader. Miller Resources, Inc. produces packaged and custom marketing tools for financial advisors and brokers. For more information, contact George Miller at (386) 668-5900, george@advisorloop.com, or P.O. Box 530610, DeBary, FL 32753.

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practice tips

Speak Out

If you could display your financial planning skills for 40 or 50 people at one time for a fraction of the cost of seminars, ads and mailings, would you be interested? Guest speaking gives you the opportunity to highlight your unique abilities for groups such as Rotary, Kiwanis, Lions, AARP and many others. These organizations have an ongoing need for guest speakers, either booked in advance or on an emergency basis to stand in for last-minute cancellations.

Guest speaking may not replace your other prospecting activities, but it can be a strong arrow in your prospecting quiver. It's also a great way to break out of the daily grind of your office routine and meet some fresh faces. Here are some tips to help you live up to your speaking potential:

>> Many clubs welcome financial topics, but product pitches are the speaker's kiss of death. Make your talk

educational, entertaining and fun. If you don't come on too strong with your business agenda, you'll be able to weave in some of your selling points without alienating anyone.

>> Do not use visual aids. Generally you are given only 10 to 20 minutes to speak, and *you* are the visual you want the crowd to remember. Most of the words you say will be forgotten, but people will remember whether or not you're the kind of person they want to sit down with. Use the podium to display the good things inside of you and save the charts and data for your one-on-one sessions later.

>> To enjoy a steady flow of speaking dates, you need to prospect clubs and organizations with the same discipline you use when prospecting for clients. Advisers who speak to groups on a stop-and-go basis rarely build up momentum and usually dismiss the effort as a waste of time after only one or two attempts. Acquiring new clients by guest speaking is a process, not an event. **FP**

George Miller writes and produces marketing tools for financial advisers under Miller Resources and AdvisorLoop.com.

Killin' em at Kiwanis

By Brooke Southall

SAN FRANCISCO — An ex-A.G. Edwards & Sons Inc. broker and executive has put down his secrets to prospecting success in a 50-page report.

George Miller, principal of Miller Resources Inc. of DeBary, Fla., left the St. Louis-based broker-dealer in 1999, but he thinks financial advisers are missing the valuable insights into prospecting that he developed there.

In his new report, "Guest Speaker," he details how to get speaking engagements, and what to say and what not to say. Mr. Miller emphasizes the kind of quick-hit meeting that needs a speaker

weekly for a 10- or 15-minute spot.

"An adviser can showcase themselves, but you need to be careful not to talk financial products or about the firm," he said. "It needs to be generic and to impress people."

But advisers also need to be realistic about how their speeches to groups will play.

"Most advisers pooh-pooh it," Mr. Miller added. "They'll speak at a Kiwanis, but if they don't get people swarming them, they say, 'Forget about it.'"

The report didn't need to be more than 50 pages to capture a lifetime of experience.

"It's not loaded up with a lot of theory," Mr. Miller said.